

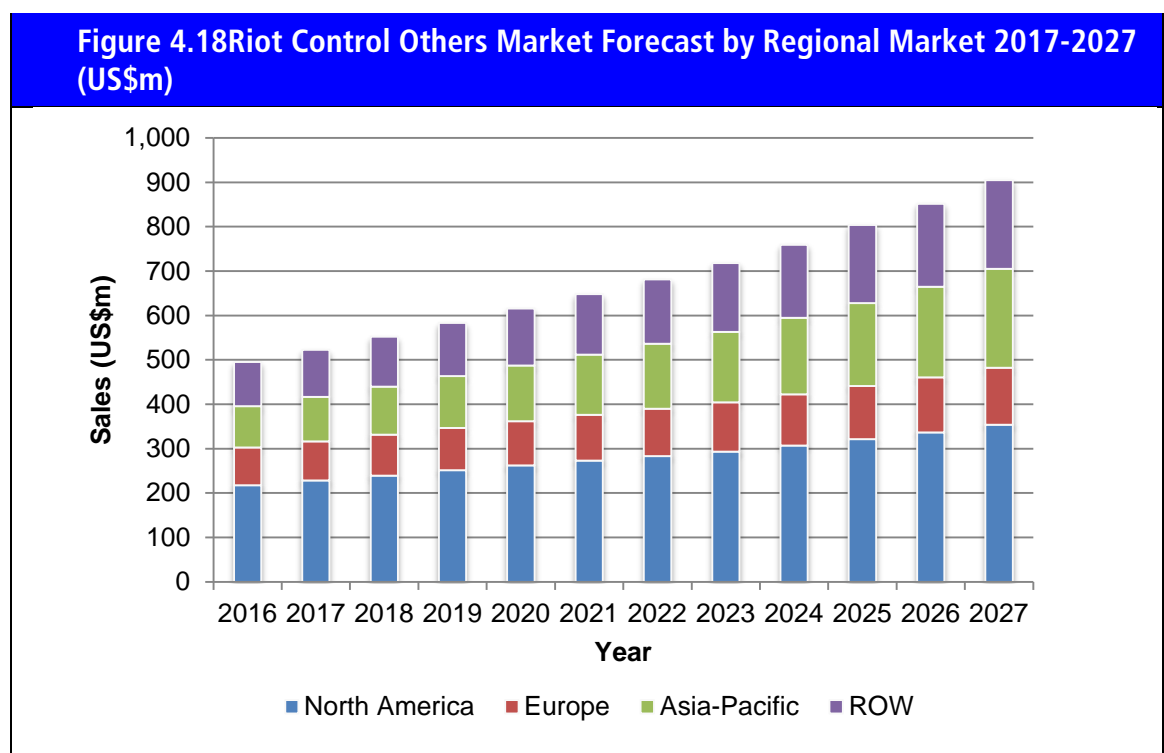
RIOT CONTROL MARKET 2017-2027

Forecasts by End-User (Law Enforcement, Military) by Product (Defensive Equipment, Offensive Weapons) by Technology (Electromagnetic & Sonic Weapons, Kinetic Impact Weapons, Chemical Agents & Others)

4.1.4 Others 2017-2027

| Table 4.5Riot Control Others Submarket by Regional Market Forecast 2017-2027 (US\$m, AGR %, CAGR %, Cumulative) | | | | | | | | | | | | | |
|--|-------|-------|-------|-------|-------|-------|---------|-------|-------|-------|-------|-------|---------|
| Sales (US\$m) | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 | 2027 | 2017-27 |
| North America | 217.9 | 228.0 | 239.3 | 251.3 | 262.5 | 273.1 | 283.0 | 293.6 | 307.3 | 321.6 | 336.5 | 353.6 | 3,149.8 |
| AGR (%) | - | 4.7 | 4.9 | 5.0 | 4.4 | 4.0 | 3.6 | 3.7 | 4.7 | 4.7 | 4.6 | 5.1 | - |
| Europe | 85.1 | 88.5 | 92.0 | 95.6 | 99.3 | 103.2 | 107.1 | 111.1 | 115.2 | 119.5 | 123.9 | 128.4 | 1,183.8 |
| AGR (%) | - | 4.0 | 3.9 | 3.9 | 3.9 | 3.9 | 3.8 | 3.8 | 3.7 | 3.7 | 3.7 | 3.6 | - |
| Asia-Pacific | 92.8 | 100.1 | 108.1 | 116.6 | 125.6 | 135.3 | 146.1 | 158.4 | 171.9 | 187.1 | 204.1 | 223.4 | 1,676.7 |
| AGR (%) | - | 7.9 | 7.9 | 7.9 | 7.8 | 7.7 | 8.0 | 8.4 | 8.6 | 8.8 | 9.1 | 9.5 | - |
| ROW | 99.4 | 105.9 | 112.8 | 120.1 | 127.9 | 136.3 | 145.2 | 154.7 | 164.8 | 175.7 | 187.3 | 199.6 | 1,630.3 |
| AGR (%) | - | 6.5 | 6.5 | 6.5 | 6.6 | 6.6 | 6.5 | 6.5 | 6.5 | 6.6 | 6.6 | 6.6 | - |
| Global | 495.2 | 522.6 | 552.2 | 583.6 | 615.4 | 647.9 | 681.5 | 717.8 | 759.3 | 803.8 | 851.7 | 905.0 | 7,640.6 |
| AGR (%) | - | 5.5 | 5.7 | 5.7 | 5.4 | 5.3 | 5.2 | 5.3 | 5.8 | 5.9 | 6.0 | 6.3 | - |
| CAGR 2017-22 (%) | 5.5 | | | | | | 2022-27 | 5.8 | | | | | - |
| CAGR 2017-27(%) | 5.6 | | | | | | | | | | | | |

Source: visiongain 2017



Source: visiongain 2017

RIOT CONTROL MARKET 2017-2027

Forecasts by End-User (Law Enforcement, Military) by Product (Defensive Equipment, Offensive Weapons) by Technology (Electromagnetic & Sonic Weapons, Kinetic Impact Weapons, Chemical Agents & Others)

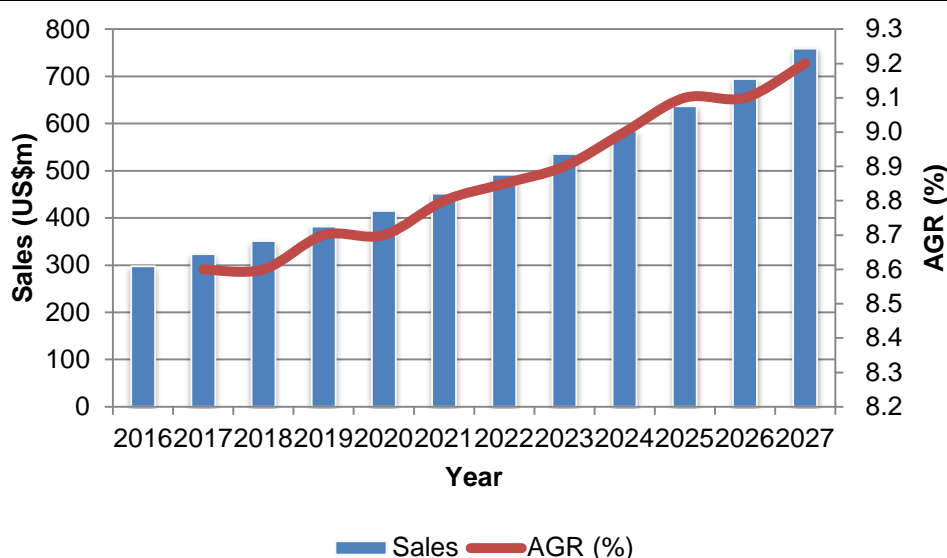
5.4.3. Australia Riot Control Market Forecast 2017-2027

Table 5.21 Australia Riot Control Market Forecast 2017-2027 (US\$m, AGR %, CAGR %, Cumulative)

| Sales (US\$m) | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 | 2027 | 2017-27 | |
|------------------|-------|-------|-------|-------|-------|-------|---------|-------|-------|-------|-------|-------|---------|---|
| Sales | 297.9 | 323.5 | 351.4 | 381.9 | 415.2 | 451.7 | 491.7 | 535.4 | 583.6 | 636.7 | 694.7 | 758.6 | 5,624.4 | |
| AGR (%) | - | 8.6 | 8.6 | 8.7 | 8.7 | 8.8 | 8.9 | 8.9 | 9.0 | 9.1 | 9.1 | 9.2 | - | |
| CAGR 2017-22 (%) | 8.7 | | | | | | 2022-27 | 9.1 | | | | | | - |
| CAGR 2017-27 (%) | 8.9 | | | | | | | | | | | | | |

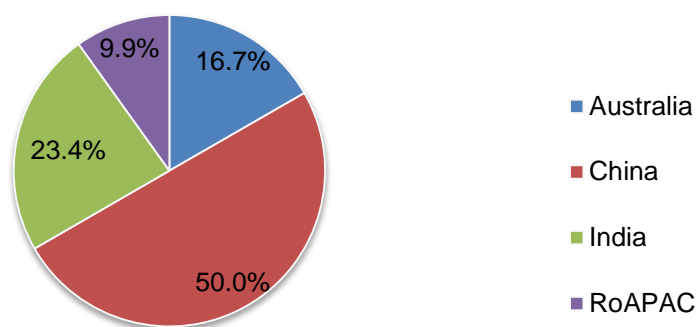
Source: *visiongain 2017*

Figure 5.58 Australia Riot Control Market Forecast 2017-2027 (US\$m, AGR %)



Source: *visiongain 2017*

Figure 5.59 Australia Riot Control Market Forecast Market Share by Country 2017 (% Share)



Source: *visiongain 2017*

RIOT CONTROL MARKET 2017-2027

Forecasts by End-User (Law Enforcement, Military) by Product (Defensive Equipment, Offensive Weapons) by Technology (Electromagnetic & Sonic Weapons, Kinetic Impact Weapons, Chemical Agents & Others)

amongst law enforcement and military agencies will directly impact the bargaining power of the suppliers.

6.3 Bargaining Power of Buyers

The impact of the bargaining powers of buyers is low to moderate in the riot control systems market, based on the following factor:

Demand For High Quality Products: Buyers in the market are largely security agencies. Considering the safety of their forces, these agencies demand highly protective and enhanced equipment for use in responding to emergency situations. This leads manufacturers to produce high-quality products in order to earn contracts from agencies.

6.4 Intensity of Competitive Rivalry

Competitive rivalry in the riot control systems market is moderate, based on the following factors:

Few Competitors: The riot control systems market has few competitors. This leads to fewer firms competing for resources, which is advantageous for companies in the market. Hence, the intensity of rivalries has a moderate impact on the riot control systems market. There are very few brand names in this market for non-lethal products and therefore these companies do not face tough competition from other companies in this segment. Companies such as Taser International, Condor Technologies, BAE Systems, Combined Systems and Raytheon (for Active Denial Systems) are the major players manufacturing non-lethal products.

6.5 Threat of Substitutes

The threat of substitutes is low in the riot control market owing to following factor:

Limited number of substitutes: riot control systems cannot be easily substituted by other technologies that fulfil the need of the law enforcement and military forces to control crowds. These weapons function to help the forces handle emergency situations, which is less likely to be accomplished by any other product or technology. Hence, limited number of substitutes impact the market in a positive way.

RIOT CONTROL MARKET 2017-2027

Forecasts by End-User (Law Enforcement, Military) by Product (Defensive Equipment, Offensive Weapons) by Technology (Electromagnetic & Sonic Weapons, Kinetic Impact Weapons, Chemical Agents & Others)

7. Leading 10 Riot Control System Companies

This section provides an overview of the leading companies in the market, including company profiles.

7.1. Leading 10 Riot Control System Companies 2017

| Table 7.1 Leading 10 Riot Control System Companies Listed Alphabetically (Company, Total Company Sales US\$m *Latest, HQ) | | |
|---|-------------------------------------|----------------|
| Company | Total Company Sales (US\$m) *Latest | Headquarters |
| BAE Systems, plc. | 27,357.3 | United Kingdom |
| Raytheon Company | 23,247.0 | United States |
| Taser International, Inc. | 197.9 | United States |
| Combined Systems, Inc. | 59.9 | United States |
| LRAD Corporation | 15.8 | United States |
| Nonlethal Technologies, Inc. | 8.0 | United States |
| Lamperd Less Lethal Inc. | 0.3 | United States |
| The Safariland Group | NA | United States |
| Eagle Industries, Inc. | NA | United States |
| Condor Non-Lethal Technologies | NA | Brazil |

* The leading companies were selected based on the size and number of their contracts within the riot control systems market, as well as their product range and history within the market in the past five years.

Source: *Visiongain 2017*